

**CITY OF CARLSBAD  
CLASS SPECIFICATION**

**JOB TITLE:**                   **OFFICE SPECIALIST I (entry)**  
                                     **OFFICE SPECIALIST II (journey)**  
                                     **SENIOR OFFICE SPECIALIST (specialized)**

**DEPARTMENT:**               **VARIOUS**

**BASIC FUNCTION:**

Under general supervision, performs a variety of typing, data entry, record keeping and general clerical work. Performs other related responsibilities as required.

**DISTINGUISHING CHARACTERISTICS:**

**Office Specialist I** is the entry-level class for clerical positions requiring basic skills, but no previous clerical experience. Employees in this class normally work under close and continuous supervision performing repetitive, specific or limited duties according to established routine procedures. While a variety of tasks may be assigned, each step usually fits a pattern that has been established and explained before work is started. Generally, work is reviewed both during the incumbent's performance and upon completion. Changes in procedures or exceptions to rules are explained in detail as they arise or referred to a higher level for resolution. This level requires a basic knowledge of department procedures and skill level.

**Office Specialist II** is the journey level class, which may be filled by advancement from the lower class of Office Specialist I, or when filled from the outside, requires prior clerical experience and advanced skills. This level works under general supervision and, within a framework of established procedures, is expected to perform a wide variety of general clerical duties with only occasional instruction or assistance. Incumbents require a general knowledge of departmental procedures and precedents, and the ability to choose among alternatives in solving problems. Employees in this class often have contact with the public, answering a variety of questions requiring knowledge of related departmental policies and procedures. Work is normally reviewed only on completion and for overall results. Depending upon assignment, may provide instruction or assistance to lower level staff in the absence of the immediate supervisor or manager, or as requested.

**Senior Office Specialist** is the specialized class requiring in-depth knowledge of a skill level, e.g., word processing, spreadsheet program; or knowledge of a technical area; or broader scope of clerical/secretarial responsibilities, e.g., entry level secretarial in a small or limited program area. Generally, this level requires more formal training or a longer period of exposure to the department operations in order to learn the more technical or detailed procedures. Incumbents work independently under broad guidelines and are expected to handle a wide variety of situations with review of overall results. Depending

upon assignment, may provide instruction or assistance to lower level staff in a lead capacity.

**KEY RESPONSIBILITIES:**

(These are representative duties and the emphasis on certain duties will vary depending on the job assignment.)

Prepare a variety of documents in draft and final form, such as, correspondence, standard forms, charts, and reports using a computer or typewriter; perform data entry; type from written, recorded, or printed sources and/or oral instructions; proofread materials for correct grammar, spelling, and punctuation.

Prepare, validate, process, and/or check a variety of documents and records, such as invoices, requisitions, application forms, and public notices for completeness, accuracy, and submission standards; compile and record fiscal transactions or payroll records according to established procedures; may keep petty cash.

Receive the public/staff to answer questions and calls; determine how incoming calls should be routed; direct people to appropriate offices; answer routine questions; explain established procedures, processes, or departmental activities; distribute and explain forms, such as applications; schedules appointments, training, or examinations; obtain information to create or update files.

Maintain records by transferring data, calculating totals and subtotals; or process technical records reviewing documents for completeness and consistency; complete standard forms; maintain cross reference files by assigning or checking filing codes to items based upon material/document content; maintain logs of processed materials. Operate and maintain automated and manual data systems in this record keeping function.

Compile reports by extracting and/or tabulating information from a variety of sources, such as files, correspondence, meeting notes, logs, previous reports, and/or oral instructions.

Sort and/or file materials, such as, correspondence, applications, documents, employee records; time stamp and distribute mail; prepare mailings; maintain cross reference files or indexes; purge filing system and destroy or archive purged records.

Operate a variety of office equipment, such as photocopiers, computers and peripheral equipment; may perform equipment/system maintenance checks; may receive and transmit messages by two-way radio.

Collect fees and payments and prepare deposits.

Provide instruction and/or assistance to others in the performance of related tasks.

Perform other related duties as assigned.

**QUALIFICATIONS:**

To perform a job in this classification, an individual must be able to perform the essential duties as generally described in the specification. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties in a specific job. The requirements listed below are representative of the knowledge, skill and/or ability required.

**Knowledge of:**

Modern office equipment, methods and procedures.

Proper English usage, punctuation, grammar and spelling.

**For Office Specialist II:**

Working knowledge of policies, procedures, and rules of the assigned work unit as related to position responsibilities.

Software applications, e.g., word processing, spreadsheet or database management, as it relates to the assigned work.

**For Senior Office Specialist:**

Thorough knowledge of department policies, procedures, and rules as it relates to the assigned work.

Thorough knowledge of software applications, e.g., word processing, spreadsheet or database management, as it relates to the assigned work.

**Skill in:**

**For Office Specialist I:**

Utilizing computers and performing basic data entry.

**For Office Specialist II and Senior:**

Keyboarding at 40 wpm net corrected speed from clear copy.

**Ability to:**

Demonstrate excellent customer service.

Use correct English grammar, punctuation, and spelling.

Maintain electronic records and manual data systems.

Alphabetize or numerically/chronologically sort materials.

Communicate effectively in oral and written form.

Develop and maintain effective working relationships.

Learn the policies and procedures of the assigned department unit as related to position responsibilities.

Understand and carry out oral and written directions.

For Office Specialist II and Senior Office Specialist:

Apply and explain policies and procedures related to the job assignment within the standard guidelines.

Work independently.

Maintain records and perform assigned program activities in accordance with established practices and general instructions.

For Senior Office Specialist:

Apply and exercise discretion and judgment in resolving problems.

## **EXPERIENCE AND EDUCATION:**

Any combination equivalent to experience and education that could likely provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required knowledge, skills, and abilities would be:

Equivalent to completion of the twelfth grade, including or supplemented by specialized training in the clerical occupation field.

For Office Specialist II:

One year of clerical experience performing varied clerical duties.

For Senior Office Specialist:

Two years progressively responsible experience including one year in a specialized capacity.\*

\*One year of specialized experience may be substituted with a combination of applied coursework or demonstrated competencies of knowledge and abilities through a proficiency program.

**PHYSICAL/MENTAL DEMANDS AND ENVIRONMENTAL SETTING:**

While performing the duties of this class, an employee is regularly required to sit; talk or hear, in person and by telephone; use hands to finger, handle, feel or operate standard office equipment; and reach with hands and arms. An employee is frequently required to walk and stand. Specific vision abilities required by this job include close vision and the ability to adjust focus to read and operate office and computer equipment as necessary during the course of the work assignments.

While performing the duties, employees of this class are regularly required to use written and oral communication skills; observe and interpret people and situations; learn and apply new information or skills; and interact with staff and others encountered in the course of work.

Incumbents may occasionally need to travel to various city locations or to off-site locations as necessary and as the assignment demands.

Depending on the assignment, there may be special environmental or additional physical or mental requirements, which will be detailed at the time of recruitment.

DATE APPROVED: 4/2001